Leading a Remote Team?
Rally Your Virtual Team to Optimal
Efficiency and Productivity

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The Virtual Facilitator – Best Practices for Virtual Teams

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Introduction Webinar to the Virtual Facilitator Series

Purpose

Help you to become more confident in getting Engagement and Action in a Virtual Environment
Session Objectives

In the context of being in a virtual environment, clarity on:
• Virtual Facilitation purposes
• Obstacles to effective engagement
• Overview of Series content
• Getting to ‘yes!’

Introductions

• Your location
• What kind of virtual meetings do you facilitate?

Definition of a Virtual Team

“Groups of individuals who work across time, space, and organizational boundaries and who interact primarily through electronic communications”

Source: SHRM Virtual Teams, 7/13/12
Painful Virtual Meetings

What challenges have you experienced in virtual meetings that you have led or attended?

Facilitation Roles

- Facilitator and Host of a team all the time
- Instructor
- Facilitator (as a valued skill for other teams / meetings)

Facilitation Roles

- Rotating leads on a longer term project
- Sometimes host and lead
- Always a participant
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Why Does Your Organization use Virtual Teams?

Poll: Why Does Your Organization use Virtual Teams?

Check as many as applicable:

A. Include talent in multiple locations
B. Increase collaboration
C. Improve productivity
D. Minimize travel costs
E. Other (specify and write in Chat box)

Working In Virtual Space

Range of Different Meeting Goals

• Collaboration & Decision-Making
• Online Engagement / Input / Learning - classes
• TeleCalls / Audio Conferences
• Info Sharing / Feedback / Dialogue
• Facilitating Meetings / Sessions


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Why are Virtual Teams and Meetings So Different from Live Meetings?

- Virtual Teams – different time zones, geographical locations, different offices, different stakes in the work
- If telephone only, getting them to see & understand what they can only hear.
- Keeping them engaged … when you can’t see them.
- We can’t tell if participants are “getting it” or if they are doing something else with other distractions.

Darn Hard

“Leadership in my book comes down to communication. But communicating in person and communicating electronically are not the same thing. It is **darn hard** to motivate and inspire from long distance.”

What are your primary road block(s) for your virtual teams?

Put in Chat Box, e.g.

- Inability to build team cohesion
- Time differences
- Others?
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What are your primary road block(s) for your virtual teams?

Other examples:
- Inability to build team cohesion
- Time differences
- Work distribution
- Differing cultural norms
- Poor communication
- No / little access to technology
- Other (put in chat box)

Virtual Team Leaders

Characteristics (qualities or skills) team leaders must demonstrate:
- Listen well
- Build trust
- Establish clear expectations
- Facilitate virtual meetings
- Build consensus
- Demonstrate cultural awareness
- Maintain a sense of humor

Poll: What do you most want to learn about leading a Virtual Meeting?

A. Preparation Aspects
B. Using features on your platform(s)
C. Design (Content, Engagement)
D. Best Practices
E. Effective use of pre / post / live time

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Five Best Practice Areas for Facilitating Teams (virtual and in-person)

1. Ensure shared purpose and intent
2. Build community and trust
3. Effective communication
4. Lead by example
5. Encourage Collaboration

Six Ps of Preparation
Key Success Factors

- Purpose - Probable Issues
- Product - Process
- People - Platform

Ah ha! The same best practices apply for virtual as in-person!

Platform Choices

- What Platform can / would you use?
- What’s out there?
- Needs vs. Bells and Whistles
- IT Support

Adapted from Michael Wilkinson (2013) Click: The Virtual Meetings Book
VF Series - Three Sessions

1. Great TeleCalls / Classes
   - Roles
   - Preparation – Self and Participants
   - Tips for Effective Calls
   - Agreements and Etiquette
   - TeleCall Basics and Options

2. Webinar Meetings / Classes
   - Web Tools Beyond TeleClass
   - Techniques for Interactive Webinars
   - Proper Technology!
   - Tips for Facilitating With Technology
   - Range of Virtual Platforms & Tools

3. Tools, Skills & Techniques
   - Pre-Readings and Work
   - Interactive Process
   - Techniques for Engagement
   - Toolkit for Managing Virtual Meetings
   - Techniques Different Size Groups
Six Ps of Preparation
Key Success Factors

• **Purpose (Why Meet?)** Meeting Purpose & Desired Outcomes

• **Product (What are the Deliverables?)**
Agenda, Reports, Handouts, etc.

• **People (Who?)** Participants & Four Roles

• **Probable Issues (to be aware of)** This may affect your process design

• **Process (How?)** Agreements, Expectations and Interactive Facilitation Design for Meeting

• **Platform (Where/When)** Technology, Timing

Questions??
Thank you & Join Us!

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